

Minnesota's Self Determination Project

A Developmental Disabilities Project Partnership - Blue Earth, Dakota, Olmsted Counties and DHS

Project Planning Work Day September 21, 1998

Attending: Karen Courtney, Milt Conrath, Greg Kruse, Polly Owens, Becky Fluegel, John Flanders, Irish Reedstrom, Kathy Kading, Linda Leiding, Janet Wassman, Claudette Johnson, Carol Lee, Lee Ann Erickson, Barb Roberts, Troy Mangan, Jill Slaikeu, Katherine Finalyson, Jane Wiemerslage, Larry Riess

A planning work day was held at the Mount Olivet Retreat Center to determine direction and activities for the remainder of Year 2 and for Year 3.

Attached is a summary of the areas prioritized and a listing of the comments, concerns and ideas generated by individuals during the session.

A tool kit was discussed. Project counties and work day participants will provide feedback to Jane on additional items or formats.

There was a brief discussion on similarities and concerns of the project counties. Key points included:

- The need to assess the commitment at the county level and work toward understandings
- Funding streams need to be flexible (this was identified as the # 1 project priority)
- Case manager training on role changes is essential
- What we reward and how we do it cannot be overlooked from an administrative perspective
- Training in traditional ways is "not the answer"
- There's a need to record methodologies to be able to step back to observe what's happening
- Case managers and county staff may find themselves advocating against each other
- Role change from social control agent to helper has a ways to go.

Barb will schedule committee meetings to develop work plans for identified priorities.

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Project Work Day September 21, 1998

Agenda

9:30 am -10:30 am

- Brief review of current status of goals/objectives/activities
- Identifying critical issues and next activities

10:30 am-10:45 am

- Break

10:45 am-12:00 pm

- Prioritizing activities
- Developing work plans for activities: time lines and methodology

12:00 pm-12:45 pm

- Lunch

12:45 pm-2:00 pm

- Finalizing work plan
- Do we want to
 - > Develop additional frameworks?
 - > Continue self determination "analysis exercise" for various groups?
- Ideas for the resource "tool" kit development

2:00 pm-2:15 pm

- Break

2:15 pm-3:30 pm

- Discussion on comparable activities/similarities
- Next meetings
 - Information and Resource
 - Housing
 - Education
 - System Redesign

Self Determination Project Work Day - September 21, 1998

Individual work day participants comments/ideas/issues

Rules/Regulations

- Review and change rules to identify barriers to self determination. This may include ICF/MR - Rule 53, consolidated standards, 24 hour rules, DT&H, 160,41, 185
- Level the playing field between DT&H and residential.
- Change GRH now!!
- Promote consumer controlled housing
- Develop workgroups to determine what can and can't be done with regulation and what needs to be changed
- Rewrite rules and laws to facilitate and promote self determination
- ICF/MR rules allow for no flexibility for people
- Changing or getting rid of rules and regulations that hinder or discourage self determination
- Change GRH procedures and rules so furniture belongs to the individual

Provider Related and Miscellaneous

- Assure the project and activities remain individualized
- Stop work on the single plan since the IDT process doesn't allow it.
- Clarify what is sufficient for a contract with consumer directed community supports service or other informal service
- Change MMIS to consumer directed community supports can be billed against an amount of money not by units of time
- Allow counties to use the consumer directed supports category now
- Parameters for the waiver amendments must be completed ASAP
- Increase choice of service providers and inform people about who provides supports
- Increase providers so there is more choice
- What can we do to incent providers and counties to change?

Education. Training and Technical Assistance

- TA to providers for supporting a per centered business
- For persons who are waiting for services they want, assure direct care staff can operationalize self determination principles and practices through incentives
- Provide training for direct line staff on their changing roles
- Assure all consumers and families know how much is spent on their services
- Target education efforts through mailings
- Provide training and mentoring individuals with disabilities on advocacy
- Develop PSAs

(Education....continued)

- Create a targeted self advocacy action plan - What about the role of support staff?
- Strengthen self advocacy in Minnesota
- Develop good mentoring for providers on how to convert to individual budgets. Determine where they can get this.
- Assure personal freedoms, liberties and civil rights are primary focus
- More aggressively apply principles and practices in rural setting for experience
- Get information to transition age kids and their families
- A video option should be considered
- Train parents and providers in principles and possibilities, new MR/RC Waivered services
- Information and training that supports role changes for all consumers, families, providers, state and counties

Public Relations

- Provide packets of information to all counties about the project
- Give people real stuff- provide examples, forms, etc. to non-participating counties
- Provide something other than a bulletin but some mechanism to begin sharing
- Use the media and parent networks effectively
- Inform the general public/community
- Create forums to share stories, resources, targeted at consumers
- More PR on all levels about what people are doing
- Promote the successful stories statewide and within the local communities
- Marketing - disseminate case studies and new ways of doing business
- Develop a statewide newsletter using the principles as a starting point

Guardianship

- Develop non public guardianship options for persons needing conservators/guardians
- We need training on the local level in this area re: parents as guardian and their role
- How do we get conservators/guardians to better understand their supporting role?

Quality

- Develop understandable quality plans at local and state level
- Develop methods that evaluate support not judge the person receiving support
- Region 10 - If it works well, let's duplicate it
- Use Region 10 process for the Self determination Project
- Formalize strategies and implement methods for QA for non-licensed supports
- Bring licensing auditors up to speed that informed choice and self determination is ok

Service Coordination/Case management

- Start using "service coordinator" as term instead of case manager
- Develop how to provide and pay for alternatives to service coordination
- Develop and implement how to increase choice of service coordination
- Service coordination vs. Case management - identify the difference
- Increase choices of service coordinators

Stakeholders

- Assess the role of the stakeholders groups and specify their role for the next 18 months
- Assure stakeholders know their roles
- How does self determination link with activities of stakeholders

Funding Related

- Let's get going with efficiency waivers
- Be more aggressive regarding changes to PCA services
- Truly individualize budgets with equitable resources - no more average rates
- DT&H rate structure makes it difficult for the provider to be creative with funding supports
- Develop new funding methods for DT&H
- Look at equity. Balance out \$ from people who have too much to people who have too little
- Parameters for people saving money
- How do we transition people who have used the waiver in the past to a budget system
- Develop mechanisms for funding providers during transitions i.e. one person leaving a 4 person group home
- Develop specific ideas on how to provide and pay for alternatives to service coordination
- Risk pools, yes? No? Should individual counties decide?
- Allocating money. What works?
- Need more specific information on how to implement from the money to planning - enough philosophy already
- Identify and or create funding that is an entitlement so every client has access to a source of money that is flexible and can be used for self determination
- Once funding streams are cleaned up to support self determination, match county dollars with federal MA funds
- Eliminate ICF/MR funding
- Continue efforts to combine and flex funding streams
- Make all funding streams flexible (like the waiver) so everyone is able to control and direct their own support resources
- Statewide consumer access to funding - flexible, accessible \$
- What really are parameters for how people spend their money
- Clarify what is allowable to be funded under the existing MR/RC Waiver and what can consumer directed community supports pay for

State wideness-

- How do we move from project counties to "this is the way we do things in Minnesota"
- What can we do to keep the momentum going in 2000 and beyond?
- Start making ties to Dept. Of Children/Family/Learning so self determination can be in the schools
- What about public schools? How can we better educate them?
- Need ongoing opportunities to support/assist local efforts
- Develop real incentives for counties, providers, direct care staff and all stakeholders to buy into self determination
- Assure adequate and meaningful incentives for providers, county staff, direct care staff to increase practices of self determination
- Increased self advocacy involvement in statewide planning
- Support network for people involved more statewide
- Be very careful about expanding self determination. You can not mandate person centered planning. There must be real buy-in by all stakeholders before it works
- Develop ways to expand self determination into other counties. Determine a way on how counties indicate an interest and who follows up with them
- Determine current project counties involvement with statewide self determination implementation for mentoring purposes
- What are the prerequisite steps for going statewide?
- Must be a planful method to implement self determination statewide for DD — before going to other disability groups
- Should we just refine our current process/involvement for a few more years before going statewide?
- State wideness - not legislating answers to self determination questions - rather have parameters communicated

Self Determination Project Work Day - September 21, 1998

Summary

Workday participants identified issues and activities for the next 1.5 years of the Project. Ideas were grouped by area and then prioritized through a group process. Areas were ranked as being led by the RWJF project counties/state or by outsourcing where additional entities/resources take the lead. Identified areas were then referred to committees to develop action plans and activities.

Area	Ideas for Area Implementation	Committee Referral for Activity/Work Plan Development
Funding Flexibility - Continue to work toward flexible funding streams (Project lead - #1 priority)	Support MA Home Care and entitlement funds being more flexible	System Redesign
	Allocation Methodologies	System Redesign
	Disengage GRH from licensing	System Redesign
	Convert ICF/MR to waiver	System Redesign
	Revise DT & H rate structure	System Redesign
	Implement MR/RC waiver efficiency procedures	System Redesign
	Determine applicable managed care methodologies to support flexible funding	System Redesign
Rules and Regulations (Project lead- # 2 priority)	Review parameters surrounding variances. Propose "standard" variance language where applicable and seek approval from the commissioner	System Redesign
	Work with licensing to provide information	System Redesign
	Analyze and develop a report regarding rules and statutes to determine links and global changes. Develop examples as part of the report	System Redesign

Area	Ideas for Area Implementation	Committee Referral for Activity/Work Plan Development
Rules and Regulation (Continued)		
(Outsource lead- # 1 priority)	Support work of Future's Initiative	System Redesign and/or Arc
Promoting Self Determination Statewide (Project lead - # 3 priority)	Develop a statewide plan that outlines project continuation and philosophy continuation	Information and Resource Committee (I&R)
	Develop activities to focus effort on the Project and develop momentum strategies	I &R
	Identify the tools and resource people to contact for the how-tos to be given to other counties. Support the development of a county tool/resource kit	I&R
Public Relations (Outsource lead- #2 priority)	Promote stories beyond local newsletters	Education
	Increase involvement of People 1st groups in PR and education	Education
	Maintain a central local for stories	Education
	Work with Arc for PR - Create focus groups facilitated by Arc	Education
	Create a statewide newsletter	Education
	Brainstorm/identify creative ideas for sharing and disseminating information	Education

Area	Ideas for Area Implementation	Committee Referral for Activity/Work Plan Development
Role Changes and Choice Information (Outsource lead - # 3 priority)	Recruit providers that have changed their way of thinking to assist with mentoring	Education
	Training and mentoring provided to families, counties, providers (especially direct support)	Education

Minnesota's

Self Determination Project

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SELF DETERMINATION PLANNING RETREAT - MEETING MINUTES

TOPIC: Project Direction: Principles, Decision Making and Measuring Success

April 9, 1998

9:30 am - 3:30 pm

Attending: Polly Owens, Becky Fluegel, Karen Courtney, Milt Conrath, Marge Brchan, Pam Erkel, Carol Anderson, Judy Emhke, Kathy Kading, Linda Leiding, Trish Reedstrom, Sharen Larson, Jill Slaikeu, Troy Mangan, Katherine Finalyson, Darlene Olson, Barb Roberts

Principles Review

The Principles were reviewed. During the first year of the Project the Principles have served as a foundation for activities. Project counties have developed more detail as needed that apply to each of the Principles. This has provided clarification and refinement at the local level.

There was a lengthy discussion regarding attitude changes and regulating actions. "Health and safety" as part of the Principles is important. How to assure health and safety was discussed. It was decided that the term "assure" would remain as part of the definition.

Decision Making

Breakout sessions were held to discuss decision making at the local level. See attached information from each group. Project participants presented their decision making process (general and specific), assessing role changes and influences on decision making.

Follow-up

Jill and Barb will arrange for an informational session regarding the MR/RC Waiver amendments. A system redesign meeting will be scheduled to discuss and decide on the next "change activities". Additional topics for discussion not covered during the retreat session will be put on the agenda for the Information and Resource Committee Meeting scheduled for April 17, 1998.

DECISION MAKING BREAKOUT SESSIONS

Blue Earth County

Mission/Vision: Self determination principles are the basis for Project ASSURE vision

Decision Points (General): Self Determination priorities are driven by project development.

Decision made by: Ultimately supervisors and county directors. Decisions are based on input and recommendations from workgroups and consumers.

Decision Points (Unique/Issue specific): Rural area; Cooperative decisions include county, family and provider; Decisions have been made to get/give input from a wide variety of stakeholders.

Decisions made by: HCFA, DHS, Legislature

Scope Decision Points: Human resources and funding; Project time lines: Scope of Project has expanded beyond DD.

Roles Assessment

Status Quo: Waiver and County Dollars

Change to: More flexibility

Action Plan: Project ASSURE allows some flexibility. Federal waivers needed

Status Quo: Consolidated Rule, 185, Federal regs, DT&H

Change to: Rule changes; Attitudinal for service coordinations, providers, others

Action Plan: Stabilization of the workforce

Prioritizing Decisions

Main focus emphasizes education and exposure to self determination principles

Broadened involvement in workgroups with previously uninvolved consumers and families

Focus workgroups on principles of self determination

Training for providers, case managers, consumers and families

Dakota County

Mission/Vision: Maslow's hierarchy for all. People with DD get their needs met in a way that works for each person.

Decision Points (General): Mission; Philosophy base; 4 Principles; Cost neutral or better
Decision made by: Dakota County Management Team and Project Team

Decision Points (Unique/Issue Specific): 7 supporting principles: who gets what resource, how people get access to resources, system of support ie. Employer of record, consumer report, training and education

Decision made by: Steering committees, advisory groups, workgroups, county boards

Scope Decision Points. # of people participating; money flow process; policy and participation agreements; support and expenditure plans; expansion time lines

Roles Assessment

Area: Families

Status Quo: Get more and find fault

Change to: Responsive, assertive, responsible

Action Plan: Communication and information

Area: Clients

Status Quo: Meek, accommodating

Change to: Assertive and responsible

Action Plan: Same as above

Area: Providers

Status Quo: Manage people

Change to: Supporters and facilitators

Action Plan: Same as above

Area: Advocates

Status Quo: Litigators and blockers

Change to : Facilitators, trust building, change agents

Action Plan: Same as above

Area: State

Status Quo: Rule makers, licensers, watch dogs

Change to: Standards development

Action Plan: Same as above

Area: County

Status Quo: Givers and controllers

Change to: Helpers



DAKOTA COUNTY SELF-DETERMINATION PROJECT

PRINCIPLES TO GUIDE DECISION-MAKING

Basic Principles to Guide Decision-Making

RELATIONSHIP PRINCIPLE: We believe that people plan with and are supported and facilitated best by those who know and care about them - that relationships are more important than rules.

SIMPLICITY PRINCIPLE: We believe when clients and families must interact with the bureaucratic helping systems, things should be made as clear, streamlined, and simple as possible. This allows the client and their support system to focus on the client's needs rather than on how to deal with formal helping systems.

HUMAN NEED PRINCIPLE: We believe that ALL people have the same human needs, as described in Maslow's hierarchy.

"WHAT WORKS" PRINCIPLE: This project is a process of success, failure, learning and getting better. It's not about finding the "right answer"; it's about finding out what works.

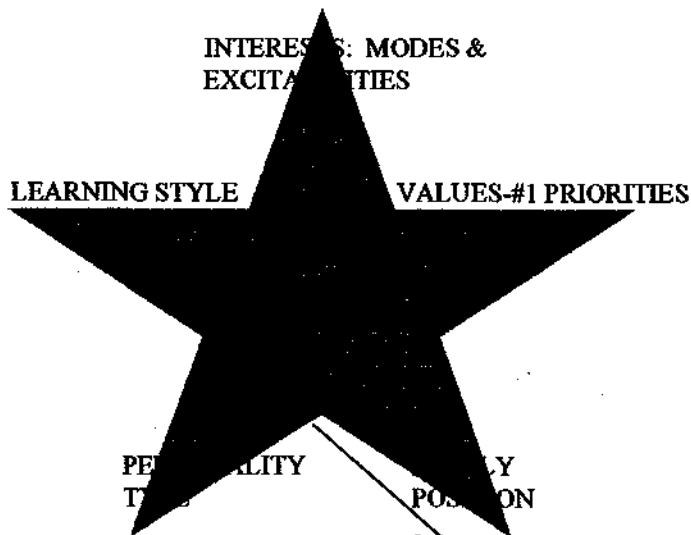
TRANSITION PRINCIPLE: We believe it is important that the current system not be seriously destabilized. We are engaged in an evolutionary process of change.

EQUITY PRINCIPLE: We believe people with similar needs should have similar financial resources with which to obtain their support.

CHANGE PRINCIPLE: We believe change is okay and in fact expected as roles change and power shifts to families and people with disabilities, that this project is about thinking outside the box, and that communication is key.

Decisions Made

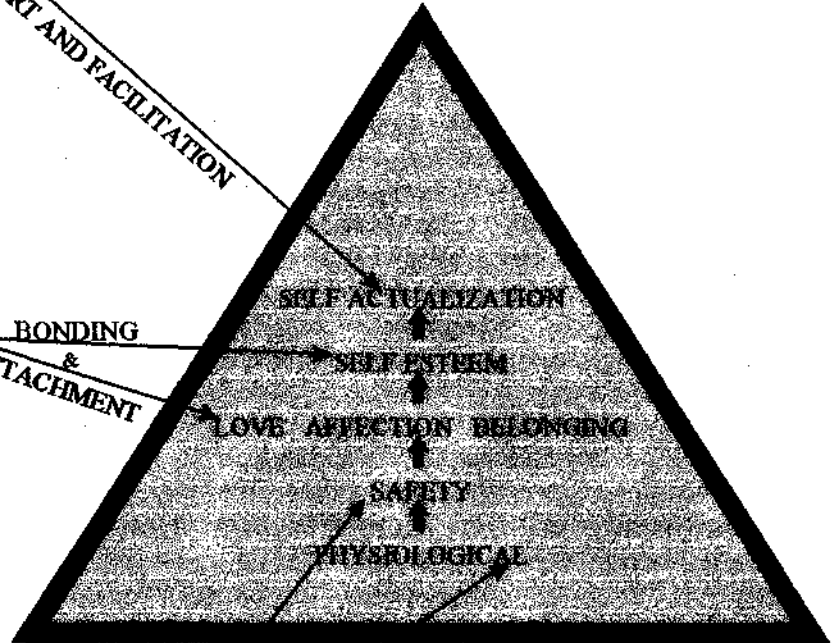
- Budgets are based on historical costs for those who are already receiving services.
- Participants are able to purchase their services and support using voucher accounts, checking accounts owned by Dakota County on which the participant/their designee is a signer.
- Persons in transition (i.e., from school to work, or moving from their family home) will receive budget based on an allocation matrix based on support needs.
- The participant chooses who coordinates their services and support. No one is excluded as a possibility.
- The participant chooses the method they will use to develop their Personal Support Plan.
- The county retains the roles of determining eligibility, determining individual budgets, approving personal support plans and evaluation.
- Resources for case management are not included in a participant's individual budget amount.
- When purchasing support from providers with whom there is a contract, participants must pay the current contracted rate.
- A Participation Agreement and Policy describing project expectations and parameters have been developed.



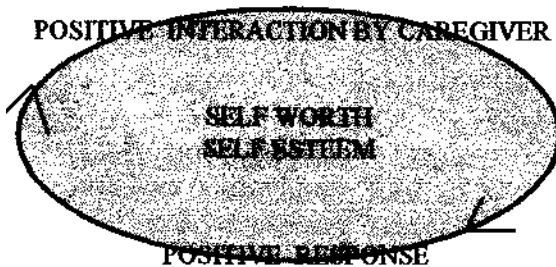
BELIEFS TO GUIDE DECISION-MAKING

DAKOTA COUNTY SELF-DETERMINATION PROJECT

MASLOW'S HIERARCHY OF NEED



POSITIVE INTERACTION CYCLE



unique genetics

environment

BONDING & ATTACHMENT

BASE NEED



AROUSAL/RELAXATION CYCLE

Olmsted County

Mission/Vision: People will lead self-determined lives

Decision Points (General): Allocating individual budgets; Determine eligibility; Parameters for spending funds; Approval/authorization of individual budget plan

Decision made by: Olmsted County

Decision Points (Unique/Issue Specific): Plan and decide how to spend funds; Choose supports; Level of service coordination; Evaluate supports

Decision made by: Individuals

Roles Assessment

Status Quo: Access funds and programs; control point

Change to: Increased role in education regarding funding and resources; support brokering for services; person/family is the control point; decrease the control for case manager and change relationships; responsible to individual; market themselves and develop specialities

Action Plan: Set a date for changes to kick in; Get input on what do you need to make this happen; education and support; budgeting education; self determination service coordination

Community Supports for Minnesotans with Disabilities Division

Mission/Vision: Persons with disabilities are important and valuable contributors in Minnesota communities. CSMD is committed to assuring that persons with disabilities and their families have viable home and community based support and service systems that provide persons with disabilities and their families choice and self determination; health and safety; well being and independence; and quality; and effectiveness of public funded supports and services.

Decision Points (General): Consistent with CSMD mission/vision; Comparable with DHS goals; Within federal and state authority; Within budget parameters; Cost benefit analysis (common good)

Decision made by: Operations Team with feedback provided by staff

Decision Points (Unique/Issue Specific): Staff resources i.e. FTEs and expertise; Research and information gathering; DHS policy; Inter agency structures; Intra agency structures; Stakeholders/Political impact; Governor and individual legislators

Decision made by: Assistant commissioners through line staff. (Depends on topic and scope)

Scope Decision Points: Existing operations workload; Immediacy of consumer needs; Ability to influence the cycle of legislature/governor/DHS vision/cluster vision/CSMD vision.

Prioritizing Decisions

Staff FTEs, staff expertise, annual budgets, consumer need; balancing between daily operations and long term changes anticipated.

DRAFT January 2, 1997

Vision: Persons with disabilities are important and valuable contributors in Minnesota communities. They are family members, friends, workers, students, home owners or renters, and active community members. To assure the maximum independence of persons with disabilities in their homes and their full participation in Minnesota's communities, services and supports will be appropriate and responsive to the individual, culturally sensitive, supportive of the person's home and community, and encourage ongoing and meaningful relationships.

Mission: The Department of Human Services's "New Division"* is committed to assuring that persons with disabilities and their families have viable home and community support and service systems that provide persons with disabilities and their families: choice and self-determination; the assurance of the health, safety, well being, and independence of persons; and quality and effectiveness of publicly funded supports and services.

Position Statement: Consistent with the core values of the Department of Human Services, the "New Division" will provide leadership, vision, and assistance to establish framework(s) for home and community supports and services to all persons with disabilities and their families which assure:

- 1) supports and services are based on the needs, preferences, and circumstances of person and his/her family;
- 2) individual care decisions are made by the person and his/her family or as close to the person as possible;
- 3) the development of locally managed infrastructures that:
 - +offer a broad based approach for serving persons with disabilities and their families;
 - +integrate and respond to the diverse health and social needs of all persons with disabilities;
 - +are effective in controlling the rising health care costs;
 - +are flexible in responding to the changing needs of persons;
 - + assure basic protections for persons and the quality of their supports and services.
 - + provide supports and services to as many eligible persons and their families as possible.
- 4) persons with disabilities receive the basic protections and quality supports and services required to achieve maximum independence.
- 5) opportunities for each person with disabilities to achieve their maximum potential.
- 6) support to families in providing care to their family members with disabilities.

*The "New Division" has yet to be named. It combines the functions of the Divisions for Person with Developmental Disabilities and Home and Community Based Services. It will focus on home and community supports and services to persons with developmental cognitive, and physical disabilities

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Project Direction: Principles, Decision Making and Measuring Success

Dunrovin Retreat Center

April 9, 1998

9:30 am - 3:30 pm

AGENDA

- 9:30am - 9:45am
 - Introductions
 - Meeting Purpose
 - Expected Outcomes
- 9:45am - 10:15am
 - Self Determination Project Principles Review
 - /Do the Principles serve as a foundation for our activities?
 - /Situations where principles have not served us well for direction?
 - /Changes needed?
- 10:15am - 10:30am - Break
- 10:30am - 12:00pm - Decision Making
 - 10:30am - 11:40pm - Breakout
 - Issues/Initiatives
 - Prioritizing
 - Support/Training Plans
 - Definitions
 - Measuring Success
 - Other identified areas
 - 11:40am - 12:00pm - Summary and additions for the afternoon
- 12:00pm - 1:00pm - Lunch
- 1:00pm - 2:15pm - Presentation and Discussion from Breakouts
- 2:15pm - 2:30pm - Break
- 2:30 pm - 3:15pm - Measuring Success, Lessons Learned
- 3:15pm - 3:30pm - Wrap Up, Future Activities,

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PRINCIPLES

Freedom - The ability for individuals, with freely chosen people, to plan and live a life with necessary support.

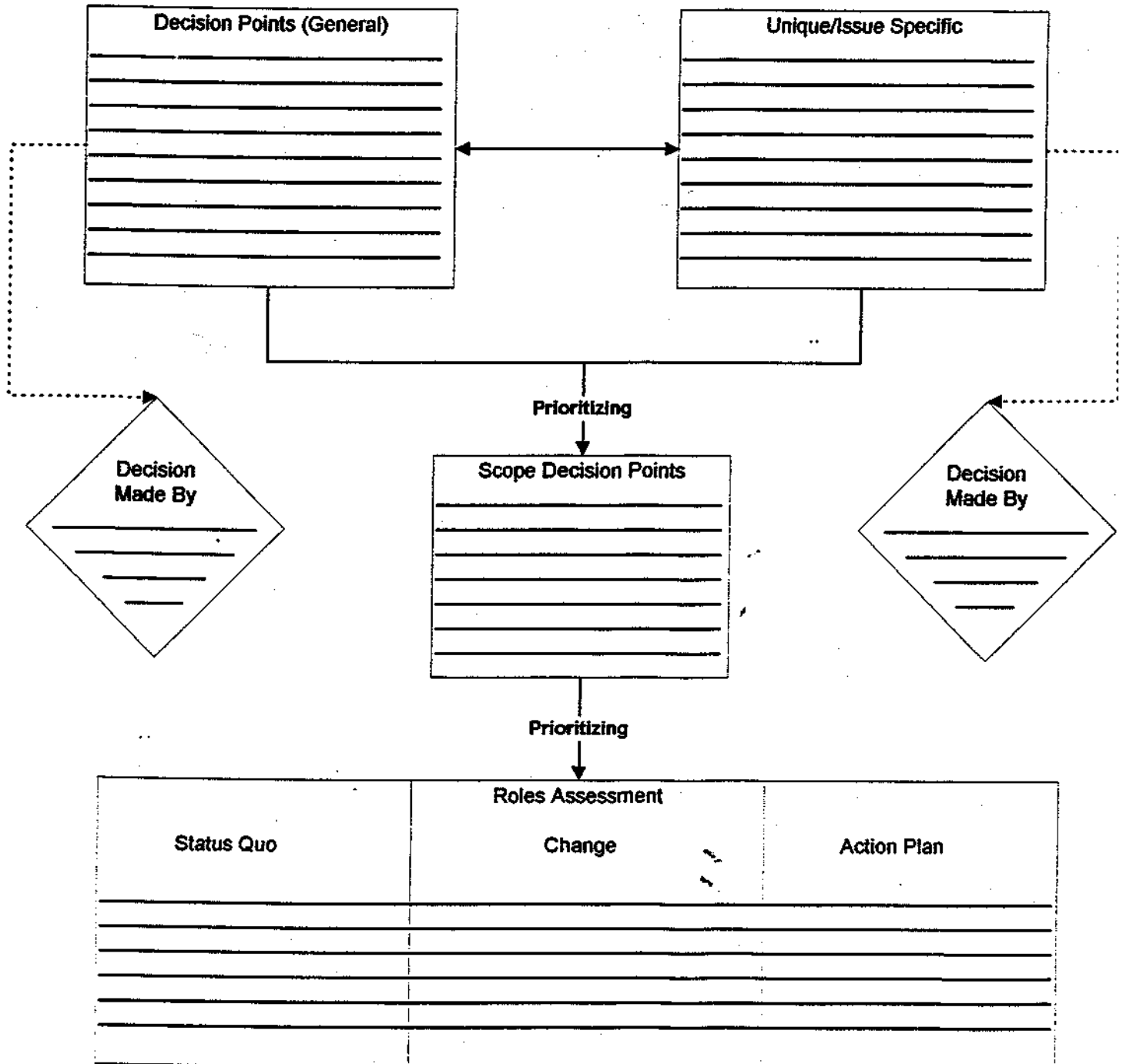
Support - The arranging of resources, both formal and informal, that will assist an individual to live a life he or she chooses.

Authority - Individuals will control resources, both formal and informal, that will assist them to live a life they choose.

Responsibility - Acceptance of the benefits and risks by an individual for choices made, and accountability for spending public money in ways that assure health and safety and that are life enhancing.

DECISION MAKING

ission/Vision



DECISION MAKING - PRIORITIZING
INITIATIVES/ISSUES/OTHER

Areas influencing prioritizing:

AREA	RANK
-------------	-------------

Mission/Vision

Resources

Risk

Time Lines

Short Range Goals

Long Range Goals

DECISION MAKING - SUPPORT/TRAINING PLANS

How ARE TRAINING/SUPPORT DECISIONS MADE?

DECISION POINTS:

Assessment of wants/needs?

What training is emphasized?

Who is trained?

Other questions/areas identified influencing training and support

DECISION MAKING - MEASURING SUCCESS
APPLYING SUCCESS AND LESSONS LEARNED

How is success measured (general? Project specific?)

How is success communicated and to who?

How are lessons learned applied to other initiatives/issues?

Minnesota's Self Determination Project

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Self Determination Planning Meeting Minutes

January 5, 1998

9:30 am- 12:30 pm

Attending: Milt Conrath, Pam Hopkins, Trish Reedstrom, Lynn Noren, Steve Larson Katherine Finlayson, Barb Roberts, Darlene Olson, Karen Courtney, Marge Brchan, Tara Barenok, Polly Owens, Paul Fleissner, Becky Fleugel, Janet Bast, John Smith

The planning meeting was held to discuss issues and receive input to facilitate planning for Project Years 2 and 3 and to develop recommendations and/or an action plan for Project workgroups.

The format for the day was addressing key questions in the area of changing roles that would support the global project outcome (consumers will have increased choice of supports and will have control over supports).

BRAINSTORMING/DISCUSSION SESSION

The following are ideas and comments related to the brainstorming session:

Focus Area: County

QUESTION # 1: WHAT DOES IT MEAN FOR THE COUNTY TO SUPPORT THE GLOBAL PROJECT OUTCOME?

- Redefining control
- Look at individual cost of supports (not an aggregate)
- Increased complexity of finances
- Reorganizing work and goals
- Changing roles - decrease caretaker role, stabilize/promote advisor and teacher role and empower staff/resources
- Need for understanding self determination outcomes-why is it important for people to have choice and control. This is multidirectional.
- Need commitment on all levels - This is hard to achieve because of letting go and having the willingness to go down a risk taking road
- Supporting all players
- Understanding "habit vs. have to"
- Re-focus on consumers and not the funding source

-Defining how self determination "fits" into the global purposes, visions, missions of the county

QUESTION # 2: WHAT SKILLS AND RESOURCES DOES THE COUNTY BRING TO FURTHER THE OUTCOME?

- Interest in the consumer
- Knowledge and information about all citizens
- Relationships with the community (families, providers, etc)
- Knowledge about existing resources
- Ability to influence resources
- Financial information and system for tracking funding
- Handling change (this was identified as a plus and minus - county may not always be proactive
- Experience supporting consumers
- Counties have each other - learning and sharing from experiences

QUESTION # 3: WHAT ARE THE INCENTIVES FOR THE COUNTY TO SUPPORT THE OUTCOME?

- Being pro-active is positive
- Different type of work could lead to "reassigning" responsibility
- Less rules
- More fund - moving to a support role instead of a care taking role
- Help people achieve their goals
- Cost effective (pay for what you get and get only what you need
- Gaining responsible citizens
- Professional and personal rewards from the changing focus of the work
- Managing costs in a new way that is local, individualized and relationship-based

QUESTION # 4 - WHAT IF THERE IS NO SUPPORT OF THE OUTCOME FROM THE COUNTY?

- Change will be mandated with little control over operations
- Consumer choice and control will be some place else
- Increased challenges and pressure will come from consumers
- A form of chaos will be created
- Status quo
- Consumer dissatisfaction

Focus Area # 2 - State

QUESTION # 1: WHAT DOES IT MEAN FOR THE STATE TO SUPPORT THE GLOBAL PROJECT OUTCOME?

- Understand and buy into the philosophy
- Flex up the rules, funding streams and reporting requirements (seamlessness)
- Develop a comfort level/trust with local self discipline (putting power in the consumer's hands, adjusting the traditional role of the state)
- Become a resource and not paternal (evaluate and reassess)
- Become comfortable with the outcomes
- Role of consultant and not dictating (increase role as informer and advisor - developing a

"user-friendly state")

- Define the information needed to build local capacity
- Make supports user friendly for the consumer and not just easy for a system
- Work of the state done more locally
- Establish "bottom-line" parameters for all 87 counties
- Maintain accountability to the federal government
- Redefine how the state measures programs
- Funding must be easily accessible
- Enhance skills in working with HCFA

QUESTION # 2: WHAT SKILLS AND RESOURCES DOES THE STATE BRING TO FURTHER THE OUTCOME?

- Economic resource
- Work with the legislature
- Stakeholder relationships
- Expertise in program development
- Positive reputation in many areas
- Willingness to experiment
- Bigger picture focus through the development of the merged division (Community Supports for Minnesotans with Disabilities)
- Political bugger from changing administrations
- Good working relationship with HCFA (having a good track record in DD areas)
- Staff and their willingness to build working relationships

QUESTION # 3: WHAT ARE THE INCENTIVES FOR THE STATE TO SUPPORT THE OUTCOME?

- Need success
- Demonstrate that the state practices what it preaches
- National recognition
- State regarded positively in communities
- Savings
- Increase program effectiveness
- More fun and work re-directed
- More equitable system
- Playing a mediation role rather than a responsibility role
- Fits with the state plan of how to support people
- Breaks barriers and not micro managing role
- Assisting the counties to assume a policy role
- Decrease and/or eliminate public guardianship

QUESTION # 4: WHAT WILL OCCUR IF THERE IS NO SUPPORT OF THE OUTCOME FROM THE STATE?

- Tremendous lack of trust by those in the Project and others in the state
- Status Quo
- No expansion
- Some individual change may take place but no global systems change
- The state would look "unfavorably" nationwide
- Increased bureaucracy

- Political fall out and negative pressure from interest groups
- Sending a message that the support of self determination is "going away"
- Larger congregate living and an increase in public guardianship

Due to time constraints other focus areas were not addressed in this session. There was a consensus that this exercise was helpful and should continue looking at focus areas of consumers, advocacy, providers, and the community.

RECOMMENDATIONS FROM THE DISCUSSIONS

Develop a communications/PR plan using the information from the meeting. A work group will address what the outcome means and what truly makes self determination different. There needs to be a willingness to measure success differently and to realize that self determination is linked closely to attitudinal changes. A key component of the plan will be to assure that others at the local sites and the state, not directly related to the Project, be informed and know the Project plans/activities and to welcome groups to be proactive and join "us" in developing strategies to address issues. The communications/PR plan will assist with evaluation also.

Continue to develop Project frameworks with an emphasis on measuring tasks and activities against the core values, philosophy, and the principles.

Develop a methodology to assure stories are documented and shared with the community.

NEXT STEPS

Workgroups will be formed and action plans developed based on the above recommendations. This will occur at the next Information and Resource Committee meeting scheduled for 1/23/98.

Minnesota's Self Determination Project

A Developmental Disabilities Project Partnership - Blue Earth, Dakota, Olmsted Counties and DHS

SELF DETERMINATION WORKGROUP

TOPIC: CRITICAL ISSUES

NOVEMBER 17, 1997

A planning work day was held to address several areas that cross all the Project current workgroups, so a "combined workgroup" planning day was held to work on those activities and issues.

Attending: Trish Reedstrom, Katie Nerem, Kathy Kading, Karen Courtney, Becky Fleugel, Polly Owens, Barb Roberts

The workgroup reviewed the outcomes of the tri-state meeting. All felt it was helpful. Agenda items for the next meeting in April 1998 should be directed to Barb.

PR/COMMUNICATIONS

Barb shared a letter from northeastern Minnesota case managers. Their concerns and questions could be used as a starting point to develop answers to concerns. Providers, advocacy groups, case managers, governmental agencies, families and the general public should all be receiving the same message, however the concerns for each audience will be different.

Three questions structured the discussion: What do we want people to know?; How best do we describe what we're doing; and How do we respond when concerns come up? The Project's answers to questions may not be "the one and only way". It was felt this was an important point when addressing questions/concerns.

Meeting with provider groups will focus on determining what they would like to see happen. It was stressed that it is not our responsibility to "change" them, but to provide information and technical assistance. The Strategic Resource Committee meeting will be re-scheduled and the small group discussions will be used to determine activities/outcomes from stakeholders. The Project staff will get together after that meeting and develop a work plan to address specific activities/concerns.

Those involved with the Project will keep track of questions and a workgroup will work on answers that support and promote self determination principles in Minnesota.

TRACKING AND DISPERSING FUNDS

Draft Project frameworks for tracking and dispersing funds were developed:

- Funds must be spent according to the consumer's plan
- Audits must be available - bills are checked against the plan
- Funds must be able to flow quickly
- Fund availability must be flexible and easy for the consumer to use
- Consumer fund allocations should be determined prior to the planning
- There must be a consistent and clear fund allocation method used
- An allocation mechanism that can be tracked must be used
- Budget tracking must be on-going
- There must be the flexible use of funds

There was a lengthy discussion regarding an allocation tool. The Demonstration project has contracted for the development of a tool and it is being reviewed. Dakota county is developing a tool. Barb will find out more about the intent of the Demonstration Project tool and how that tool may relate to the Self Determination Project.

OTHER ISSUES

There were questions regarding the PCA legislation including content and time lines. Barb will follow up with Bob Meyer.

The evaluation proposal from the U of M met the requirements of the RFP. There was a concern that they were the only responder.

The Project activity time lines were reviewed and revised.